

Date/Time	Person Called	Phone Number	Purpose of Call	Result/Action needed

The contents of this checklist are intended to provide helpful suggestions to a family member or other survivor who has assumed the duties of concluding the affairs of a loved one/decedent. The list is not intended to be exhaustive. It is not intended to provide legal or financial advice nor to be relied on in lieu of such services. If you have specific questions relating to an estate you are handling, you may find it helpful to consult with a probate attorney or financial professional.